

Job Aid: How to Request Quote Revisions

This Job Aid Shows How To:

- Request quote revisions from Vendors

Of Special Note:

Revisions are available for both formal & informal bids but cannot be activated until the Bid Opening Date/Time has passed, the bid status is 'Opened', and quotes are being reviewed and evaluated. Remember that vendors can no longer submit new quotes or edit the quotes that they have already submitted in response to the bid after the opening date has passed. However, once a bid has been opened, you can request clarifications and best and final offers (BAFOs) via the proposal revision feature on the Revisions tab of the Bid Tabulation (Bid Tab) for that bid.

In order to activate the revision process, the bid owner must select which Quote/Vendor from whom you wish to request the revision. The COMMBUYS system will allow the bid owner to customize an email request that will be sent to the vendor, notifying them of this request, and also specify what additional or clarifying information will be requested on the revised quote. The bid owner will also assign a due date as to when the revision must be completed by the vendor, then close the revision request and recommence quote evaluation.

NOTE: When requesting bid revisions, departments still must follow OSD guidance for clarifications/BAFOs, etc.

Screenshot



Directions

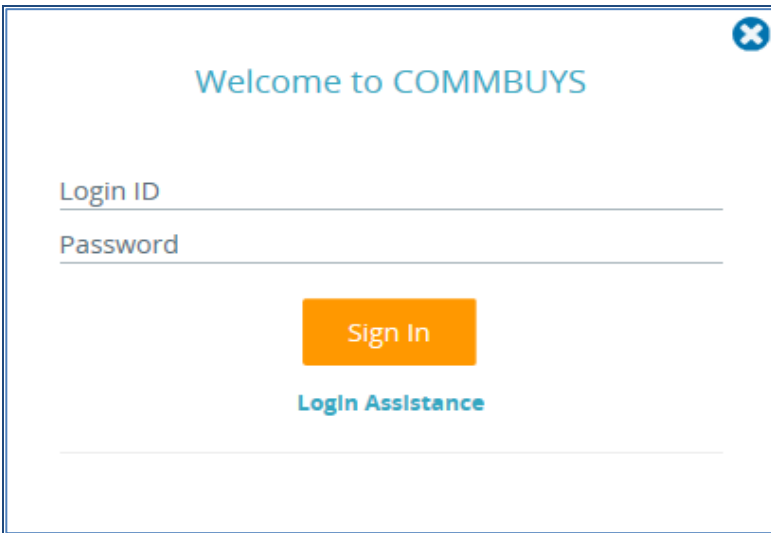
Step 1: Accessing the COMMBUYS Landing Page

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](#).
2. Click on the orange **Sign In** button in the upper right hand corner.

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Step 2: Logging In

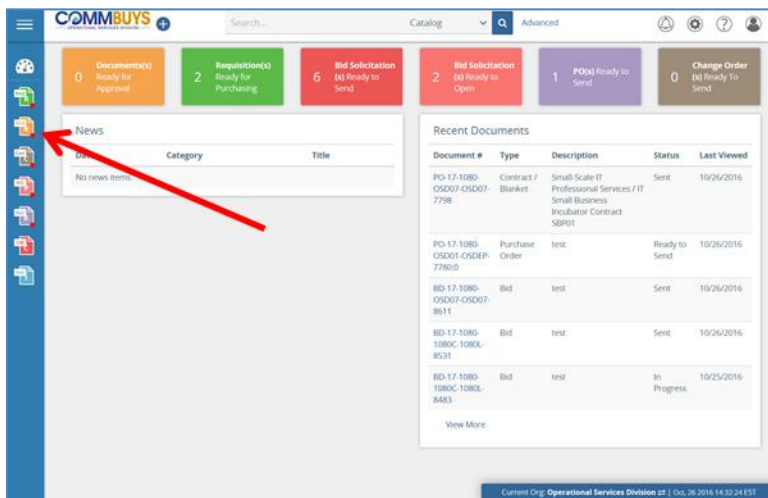
1. Enter your Login ID and Password.
2. Click on the **Sign In** button.



Step 3: Clicking the Bid Solicitations Icon

The main menu displays. Click on the orange **Bid Solicitations** icon on the left side of the screen.

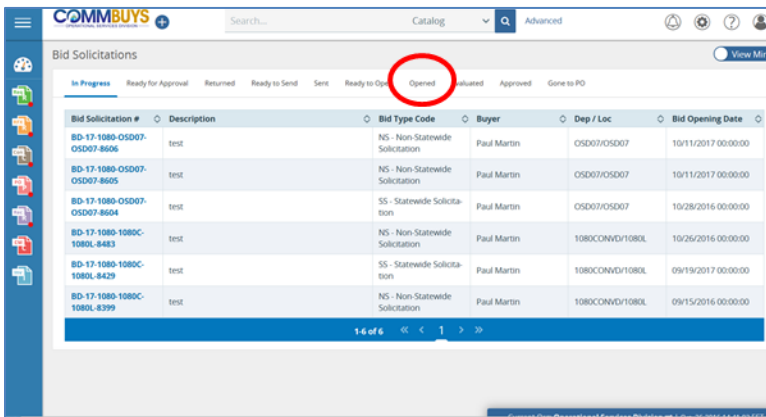
NOTE: The bid you wish to revise must have you listed as the purchaser, or you need the appropriate COMMBUYS privilege to revise.



Step 4: Clicking on the Opened Tab

The Bid Solicitations screen displays. Click on the **Opened** tab.

NOTE: If the bid is not opened, it will still be in Sent status. Find the Sent bid and click on the blue hyperlink to open it. From the Summary page, click the **Open Bid** button at the bottom of the page to move the bid to an Opened status.



Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date
BD-17-1080-OSD07-8606	test	NS - Non-Statewide Solicitation	Paul Martin	OSD07/OSD07	10/11/2017 00:00:00
BD-17-1080-OSD07-8605	test	NS - Non-Statewide Solicitation	Paul Martin	OSD07/OSD07	10/11/2017 00:00:00
BD-17-1080-OSD07-8604	test	SS - Statewide Solicitation	Paul Martin	OSD07/OSD07	10/28/2016 00:00:00
BD-17-1080-1080C-1080L-8483	test	NS - Non-Statewide Solicitation	Paul Martin	1080C/OSD/1080L	10/26/2016 00:00:00
BD-17-1080-1080C-1080L-8429	test	SS - Statewide Solicitation	Paul Martin	1080C/OSD/1080L	09/19/2017 00:00:00
BD-17-1080-1080C-1080L-8399	test	NS - Non-Statewide Solicitation	Paul Martin	1080C/OSD/1080L	09/15/2016 00:00:00

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Step 5: Selecting a Bid

A list of available open bids displays.

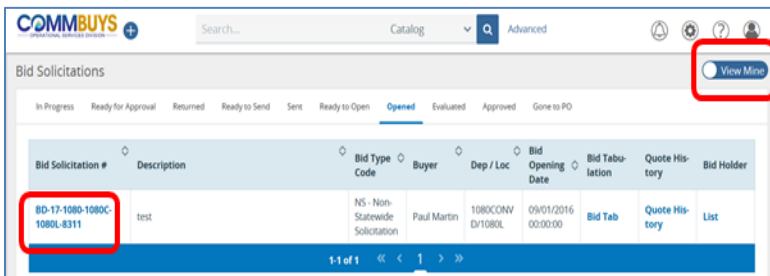
If you wish to locate a bid not assigned to you, click on the blue **View Mine** button on the top right and the display changes to a “**View All**” display.

Click on a blue hyperlink in the **Bid Solicitation #** column to open the bid.

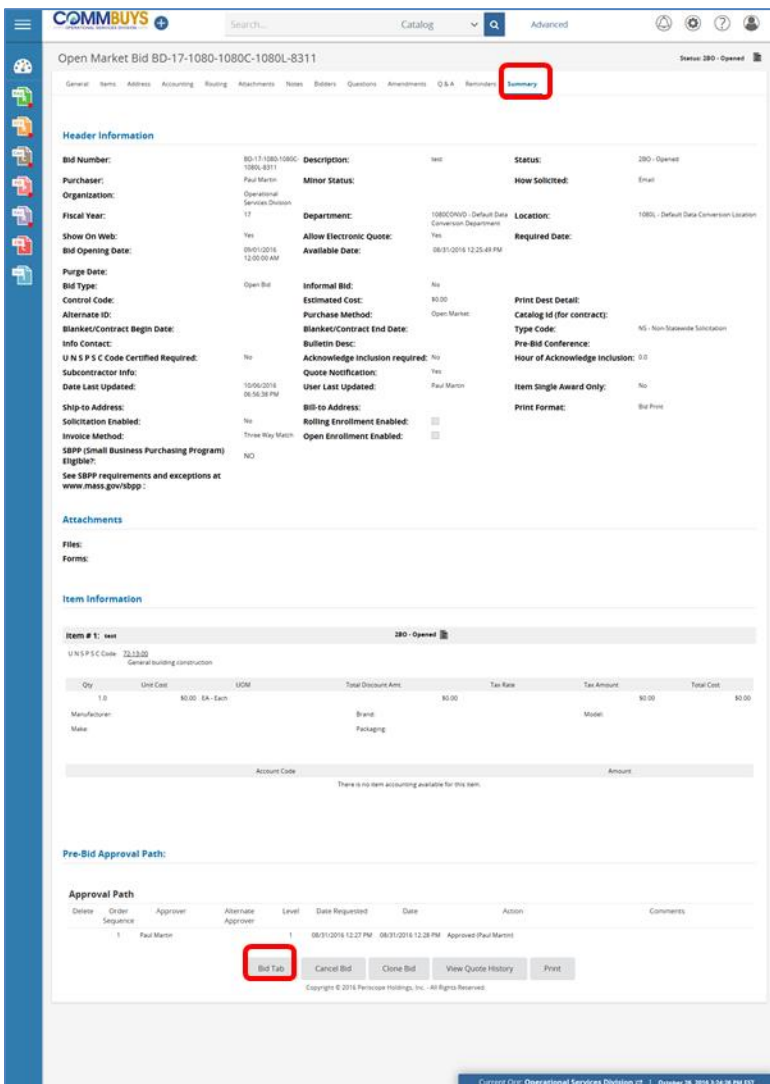
Step 6: Clicking the Bid Tab Button

The Bid opens to the **Summary** tab.

Scroll to the bottom of the page and click on the **Bid Tab** button.



Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	Bid Tabulation	Quote History	Bid Holder
BD-17-1080-1080C-1080L-8311	test	NS - Non-Statewide Solicitation	Paul Martin	1080CONV D/1080L	09/01/2016 00:00:00	Bid Tab	Quote History	List



Open Market Bid BD-17-1080-1080C-1080L-8311

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q & A Revisions

Header Information

Bid Number: BD-17-1080-1080C-1080L-8311
Purchaser: Paul Martin
Organization: Operational Services Division
Fiscal Year: 17
Show On Web: Yes
Bid Opening Date: 09/01/2016 12:00:00 AM
Purge Date:
Bid Type: Open Bid
Control Code:
Alternate ID:
Blanket/Contract Begin Date:
Info Contact:
UNSPSC Code Certified Required: No
Subcontractor Info:
Date Last Updated: 10/06/2016 06:56:38 PM
Ship-to Address:
Solicitation Enabled: No
Invoice Method: Three Way Match
SBPP (Small Business Purchasing Program) Eligible: No
See SBPP requirements and exceptions at www.mass.gov/sbpp.

Minor Status:
Department: 1080CONV - Default Data Conversion Department
Allow Electronic Quote: Yes
Available Date: 08/31/2016 12:25:49 PM
Informal Bid: No
Estimated Cost: \$0.00
Purchase Method: Open Market
Blanket/Contract End Date:
Bulletin Desc:
Acknowledge Inclusion required: No
Quote Notification: Yes
User Last Updated: Paul Martin
Bid-to Address:
Bidding Enrollment Enabled:
Open Enrollment Enabled:

Status: 280 - Opened
How Solicited: Email
Location: 1080L - Default Data Conversion Location
Required Date:
Print Dest Detail:
Catalog Id (for contract):
Type Code: NS - Non Statewide Solicitation
Pre-Bid Conference:
Hour of Acknowledge Inclusion: 0:0
Item Single Award Only: No
Print Format: Bid Print

Attachments

Files:
Forms:

Item Information

Item # 1: Item 280 - Opened

UNSPSC Code 721320 General building construction

Qty	Unit Cost	UOM	Total Discount Amt	Tax Rate	Tax Amount	Total Cost
1.0	\$0.00 EA - Each			\$0.00	\$0.00	\$0.00

Manufacturer:
Model:
Brand:
Packaging:

Account Code:
Amount:
There is no item accounting available for this item.

Pre-Bid Approval Path:

Approval Path

Delete	Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
	1	Paul Martin		1	08/31/2016 12:27 PM	08/31/2016 12:28 PM	Approved Paul Martin	

Bid Tab Cancel Bid Clone Bid View Quote History Print

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Current Org: Operational Services Division 07 | October 10, 2016 3:54:38 PM EDT

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Step 7: Reviewing the Bid Tabulation Page

The **Bid Tabulation** page displays all the Quotes received for the selected bid. Each vendor has a default check in the checkbox in the left column.

To request a revision, decide which vendors you'd like to request a revision from, and to determine if you would like to send multiple vendors the same revision request email, or if you will need to personalize the request email for individual vendors.

To unselect a vendor, select the checkbox next to the desired vendor and the check will disappear.

Click on the **Revisions** tab.

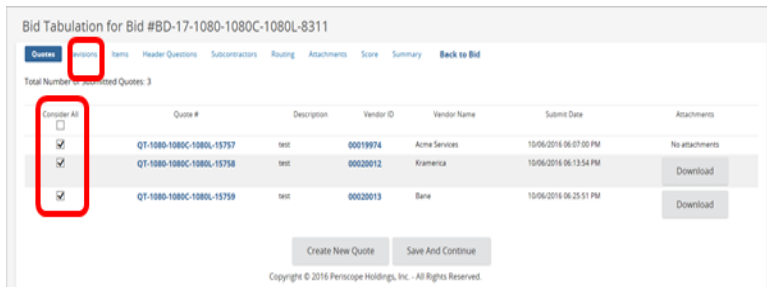
Step 8: Sending the Notification

1. To send the same request to multiple vendors, pick a due date for each revision by clicking on the calendar icon in the Due Date column, then select the check box in the **Request Revision** column for each vendor to receive the request email.

To send a revision request to one vendor, pick the **Due Date** for that vendor's revision, then click on the **Create Notification** button in the **Notification Actions** column next to the vendor you'd like to request a revision from.

2. Click on the **Send Notification to Selected Vendors** button on the bottom of the screen.

NOTE: While the revision process remains open, you will be prohibited from recommending award, and the vendor can submit and withdraw their quote as needed. They are also able to acknowledge any amendments that were applied to the bid prior to the Bid Opening Date/Time.



Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

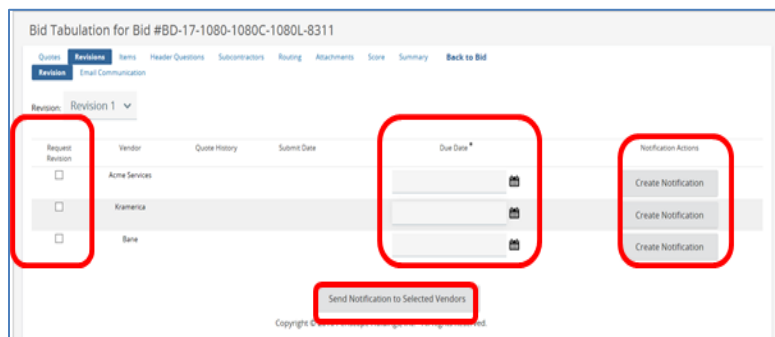
Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Total Number of Submitted Quotes: 3

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15757	test	00019974	Acme Services	10/06/2016 06:07:00 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15758	test	00020012	Kramencia	10/06/2016 06:13:54 PM	Download
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15759	test	00020013	Bane	10/06/2016 06:25:01 PM	Download

Create New Quote Save And Continue

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Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Revision: Revision 1

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input type="checkbox"/>	Acme Services				Create Notification
<input type="checkbox"/>	Kramencia				Create Notification
<input type="checkbox"/>	Bane				Create Notification

Send Notification to Selected Vendors

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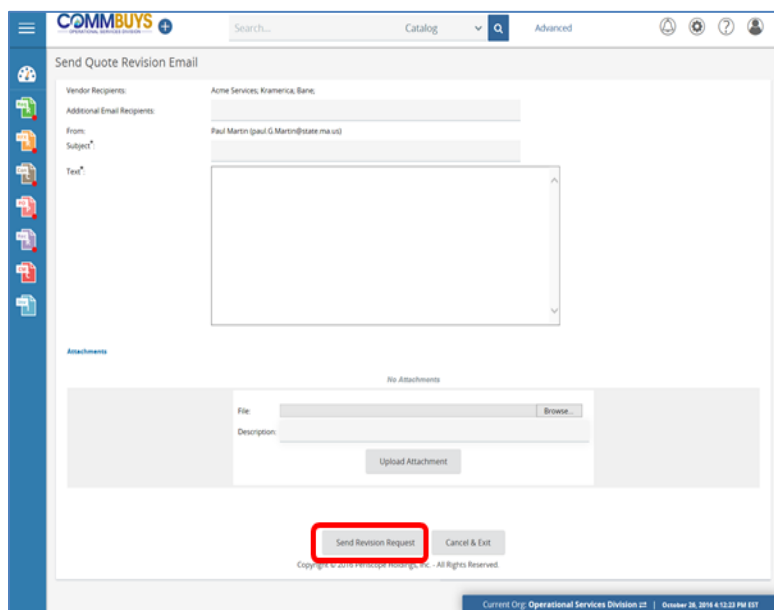
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Step 9: Sending the Revision Request

1. The **Send Quote Revision Email** screen displays enabling you to develop the email message that will be sent requesting the proposal revision(s), including adding **Additional Email Recipients**, a **Subject**, **Text** (body), and **Attachments**.
2. Once complete, click on the **Send Revision Request** button along the bottom of the screen.

NOTE: the **Text** field does not support standard formatting, so it is recommended that you limit the text in this field and include any instructions in attached documents. Also note that this email will not appear in your email's Sent folder, so if you need a copy for your records, include your own email in the **Additional Email Recipients** field.

See below for optional instructions that may be helpful for the vendors to locate and respond to revision requests.



The screenshot shows the 'Send Quote Revision Email' interface. At the top, there's a search bar and navigation tabs. The main area has fields for 'Vendor Recipients' (Acme Services, Kramercia, Banc), 'Additional Email Recipients', 'From' (Paul Martin (paul.g.martin@state.ma.us)), 'Subject', and a large 'Text' area. Below these is an 'Attachments' section with a 'File' field, 'Description', and an 'Upload Attachment' button. At the bottom, the 'Send Revision Request' button is highlighted with a red box, next to a 'Cancel & Exit' button. The footer shows 'Current Org: Operational Services Division 22' and a timestamp.

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Optional instructions that could be part of the email notification sent to the vendor to assist in locating and responding to a revision request:

1. Log in to the COMMBUYS system
2. Under the "Home - Welcome Back Your Name" message, select the Quotes tab.
3. Next click on the Revision sub tab. You should see a (1) indicating that the Revision is still open to you, and your response is requested.
4. Click on the Quote # hyperlink, which now lists an '-R1' indicating this is the first revision of your initial quote. Subsequent revision requests will change the number (R2, R3, etc...)
5. You will now be asked to confirm that this revised quote has not yet been submitted. Click on **Yes** to begin editing the quote.
6. The system will display the General tab and you can begin editing the quote as needed. Please note that once all changes are made under a certain tab, you must click on the **Save & Continue** button. Please complete work to all tabs (as needed).
7. Once all edits have been made, move to the Summary tab for review.
8. Once review is completed, click on the **Submit Quote** button at the bottom of the Summary tab. The system will ask that you confirm your intent to submit the quote.
9. You will then receive an email confirmation that the Quote has been submitted.

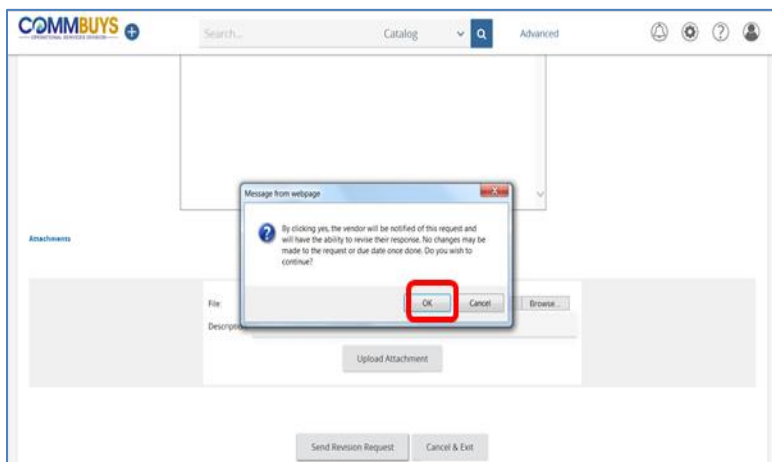
Click on the **OK** button to send the email to the selected vendor.

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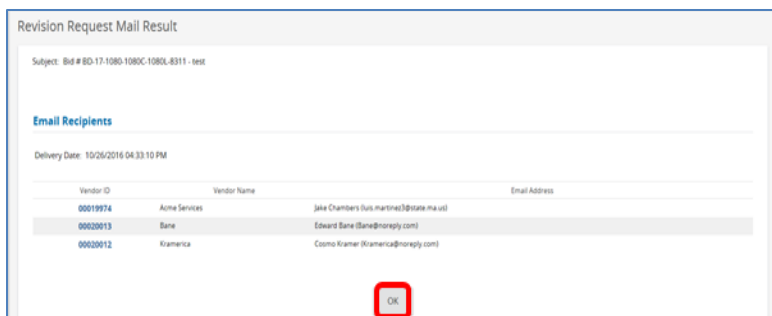
Step 10: Acknowledging the Pop-up Message

A pop-up message displays, confirming your intent to make vendors' Quotes editable and to send the email. If you agree, click on the **OK** button.



Step 11: Acknowledging the Email Recipients

The Revision Request Mail Result Page displays. Click on the **OK** button.



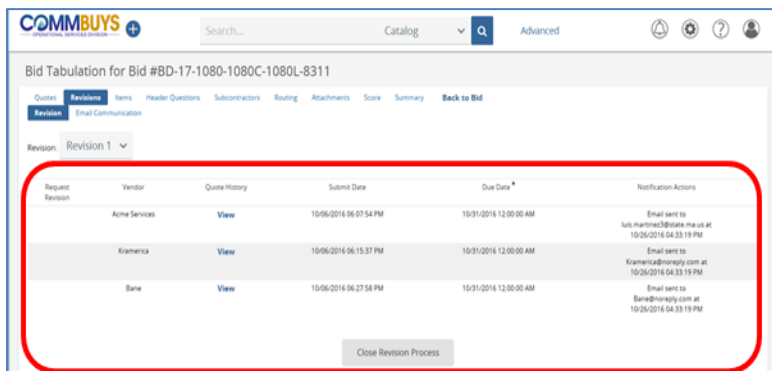
Step 12: Validating the Sent Request

The Bid Tabulation Revisions page displays showing that the revision request was sent.

NOTE: *IMPORTANT*
Do not select **Close Revision Process** until:

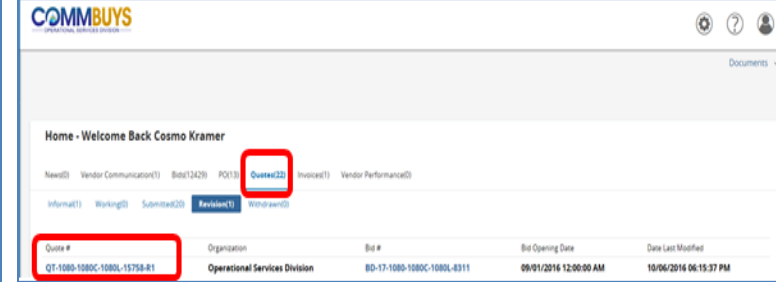
- The selected due date has passed
- You have confirmation that the revised quotes have been submitted
- A decision to end the revision opportunity has been made

See below for more information.



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How to Request Quote Revisions



The screenshot shows the COMMBUYS vendor portal interface. At the top, there's a navigation bar with the COMMBUYS logo and a 'Documents' dropdown. Below this is a 'Home - Welcome Back Cosmo Kramer' header. A navigation menu includes links for 'Newest(0)', 'Vendor Communication(1)', 'Bids(12426)', 'RFI(13)', 'Quotes(22)', 'Invoices(1)', and 'Vendor Performance(0)'. The 'Quotes(22)' link is highlighted with a red box. Below the navigation menu is a sub-menu with 'Informa(1)', 'Working(0)', 'Submitted(0)', 'Revised(1)', and 'Withdrawn(0)'. The 'Revised(1)' link is also highlighted with a red box. Below the sub-menu is a table with the following data:

Quote #	Organization	Bid #	Bid Opening Date	Date Last Modified
QT-1080-1080C-1080L-15758-R1	Operational Services Division	BD-17-1080-1080C-1080L-4311	09/01/2016 12:00:00 AM	10/06/2016 06:15:37 PM

NOTE: This is what the Vendor sees.

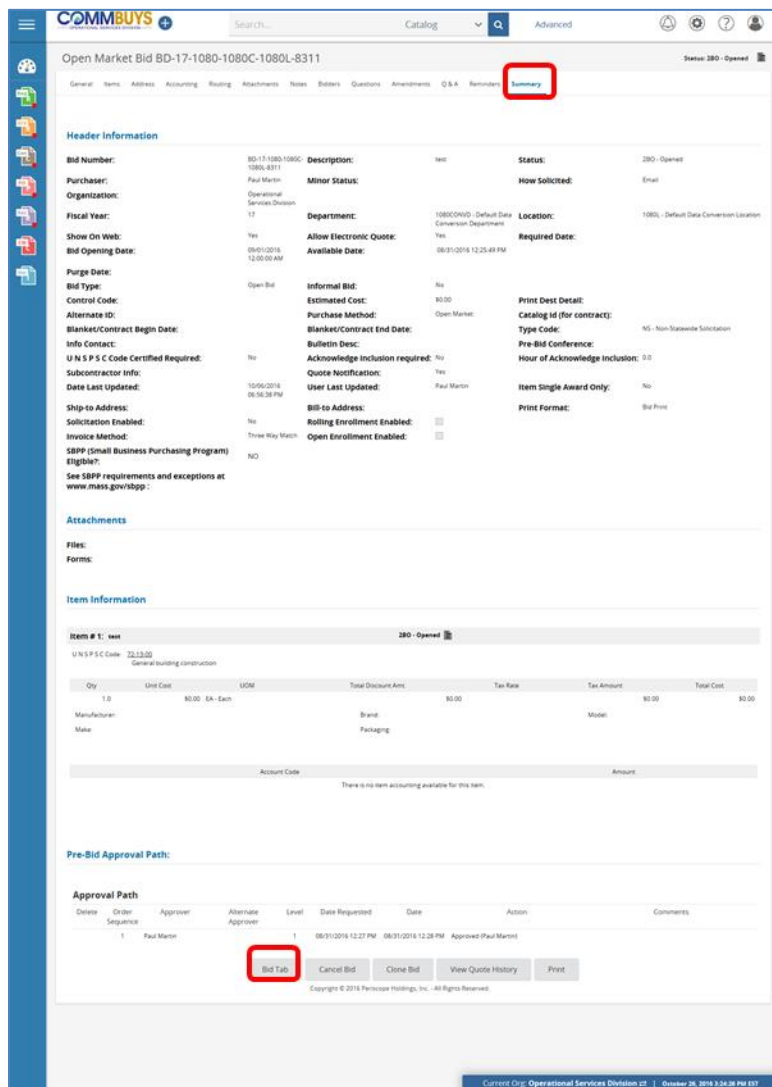
Vendors will access the request for revision by clicking the Quotes tab, the Revisions sub-tab, and then clicking on the blue hyperlink in the **Quote #** column

After acknowledging the quote, all fields will be open for editing, allowing the vendor to change all aspects of their Quote, including their item price quotes, question/answers, Terms & Conditions response and exceptions, and attachments. After completing the editing process, the vendor can submit their revision by clicking on the **Submit Quote button** on the Summary tab. Revisions can be submitted and withdrawn as desired by the vendor until you choose to close this revision round.

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Step 13: Accessing the Bid Tabulation Page

Once you are ready to review the revised Quotes, return to the bid Summary tab, scroll to the bottom of the page and click on the **Bid Tab** button.



Open Market Bid BD-17-1080-1080C-1080L-8311

Header Information

Bid Number: BD-17-1080-1080C-1080L-8311 Description: Item Status: 280 - Open

Purchaser: Paul Martin Minor Status: How Solicited: Email

Organization: Operational Services Division 12 Department: 1080COWD - Default Data Conversion Department Location: 1080L - Default Data Conversion Location

Fiscal Year: Show On Web: Yes Allow Electronic Quote: Yes Required Date: 08/31/2016 12:25:49 PM

Bid Opening Date: 08/01/2016 12:00:00 AM Available Date: 08/31/2016 12:25:49 PM

Purge Date: Bid Type: Open Bid Informal Bid: No

Control Code: Estimated Cost: \$0.00

Alternate ID: Purchase Method: Open Market

Blanket/Contract Begin Date: Blanket/Contract End Date: Print Desc Detail: Catalog Id (for contract):

Info Contact: Bulletin Desc: Type Code: NS - Non-Standard Solicitation

U N S P S C Code Certified Required: No Acknowledge Inclusion required: No

Subcontractor Info: Quote Notification: Yes Pre-Bid Conference: Hour of Acknowledge Inclusion: 0:0

Date Last Updated: 10/06/2016 06:13:54 PM User Last Updated: Paul Martin Item Single Award Only: No

Ship-to Address: Bill-to Address: Print Format: Bid Print

Solicitation Enabled: No Rolling Enrollment Enabled: Open Enrollment Enabled:

Invoice Method: Three Way Match

SBPP (Small Business Purchasing Program) Eligible: NO

See SBPP requirements and exceptions at www.mass.gov/sbpp

Attachments

Files:

Forms:

Item Information

Item # 1: Item 280 - Open

U N S P S C Code: 22.13.00 General building construction

Qty	Unit Cost	UOM	Total Discount Amt	Tax Rate	Tax Amount	Total Cost
1.0	\$0.00 EA-Each			80.00	\$0.00	\$0.00

Manufacturer: Brand: Model:

Make: Packaging:

Account Code: Amount:

There is no item accounting available for this item.

Pre-Bid Approval Path:

Approval Path

Delete	Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action	Comments
	1	Paul Martin		1	08/31/2016 12:27 PM	08/31/2016 12:28 PM	Approved (Paul Martin)	

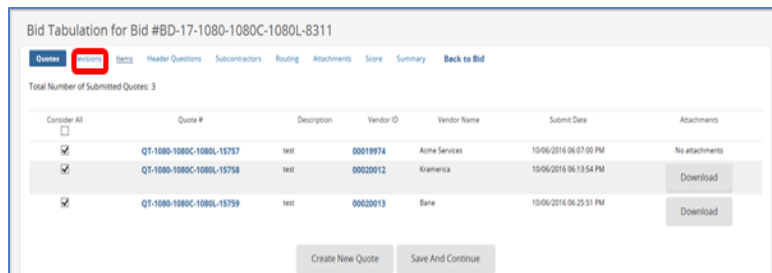
Bid Tab Cancel Bid Close Bid View Quote History Print

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Current Org: Operational Services Division 02 - December 30, 2016 3:34:36 PM 031

Step 14: Accessing the Revisions Tab

The **Bid Tabulation** page displays. Click on the **Revisions** tab.



Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

Quotes Revisions Items Header Questions Subcontractors Routing Attachments Score Summary Back to Bid

Total Number of Submitted Quotes: 3

Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15757	Item	00019974	Acme Services	10/06/2016 06:07:00 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15758	Item	00020012	Kramencia	10/06/2016 06:13:54 PM	Download
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15759	Item	00020013	Bane	10/06/2016 06:25:51 PM	Download

Create New Quote Save And Continue

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Step 19: New Revision

If needed, you can conduct another revision round, starting the request process again.

In this example, the revision dropdown now displays **Revision 4**.

Bid Tabulation for Bid #BD-17-1080-1080C-1080L-8311

[Quotes](#)
[Revisions](#)
[Items](#)
[Header Questions](#)
[Subcontractors](#)
[Routing](#)
[Attachments](#)
[Score](#)
[Summary](#)
[Back to Bid](#)

[Revision](#)
[Email Communication](#)

Revisions: Revision 4

Request Revision	Vendor	Quote History	Submit Date	Due Date *	Notification Actions
<input type="checkbox"/>	Acme Services				Create Notification
<input type="checkbox"/>	Kramerica				Create Notification
<input type="checkbox"/>	Bane				Create Notification

Send Notification to Selected Vendors